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MEMORANDUM FOR TAXPAYER ADVOCATE SERVICE EXECUTIVES  
HEADQUARTERS AND AREA DIRECTORS

FROM: /s/Nina E. Olson  
National Taxpayer Advocate

SUBJECT: Fiscal Year 2007 Taxpayer Advocate Service Program Letter

The Taxpayer Advocate Service (TAS) must continue meeting the challenge of fulfilling its mission<sup>1</sup> at a time of limited resources and increased taxpayer needs. We make a difference in taxpayers' lives. As advocates, we listen and often determine if we have an opportunity to educate the taxpayer, rectify the current problem(s), and get to the "right" answer. This approach ultimately saves resources by improving voluntary compliance and reducing expensive rework.<sup>2</sup>

Our responsibility and commitment to protect taxpayer rights and reduce taxpayer burden remain the same.<sup>3</sup> In FY 07, more taxpayers may meet TAS acceptance criteria due to economic trends and increased enforcement activities, including privatized collection work.

Congress and oversight organizations have recognized the value that TAS adds to tax administration, and this recognition has created many opportunities to influence IRS initiatives.<sup>4</sup> Our outreach, case advocacy, and systemic advocacy provide us the unique ability to understand IRS operations and recommend taxpayer-centric improvements to new and existing programs alike. We will look for innovative ways to maintain high quality advocacy for taxpayers, even as our caseload grows in complexity, if not volume.

We are guided by TAS's four strategic objectives.

- I Advocate changes in tax law or procedures that protect taxpayer rights, reduce taxpayer burden, and improve IRS effectiveness.
- II Improve TAS' ability to identify and respond to taxpayer concerns.

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<sup>1</sup> The TAS Mission: As an independent organization within the IRS, we help taxpayers resolve problems with the IRS and recommend changes that will prevent the problems.

<sup>2</sup> National Taxpayer Advocate 2007 Objectives Report to Congress, ix.

<sup>3</sup> See TAS's Four Strategic Objectives, *infra*.

<sup>4</sup> National Taxpayer Advocate 2007 Objectives Report to Congress iv-ix.

- III Identify significant sources of TAS casework and work with operating divisions on strategies to reduce inappropriate TAS workload
- IV Ensure the human resources component of TAS is adequate to meet its workload demands.

This program letter communicates specific actions required of TAS personnel in support of our strategic objectives and FY 07 operational priorities. These actions emphasize our commitment to:

- Provide top quality service to each taxpayer in every contact and to all taxpayers through fair and uniform application of the law;
- Improve business results by revamping our operational practices and processes through organizational assessments and improvement projects; and
- Improve the level of employee engagement by ensuring all employees understand what is expected of them at work, how their work relates to the mission and goals, and the importance of their work.<sup>5</sup>

Use the attached document to guide your offices in delivering effective program objectives and reporting key actions throughout the year by developing local and area plans. TAS has the following specific FY 07 business goals:

- Cumulative quality rating of 91.0% as measured by Centralized Quality Review System (CQRS) and TAS Quality Standards.
- Cumulative Customer Satisfaction mean score of 4.44 as measured by the TAS Customer Satisfaction Survey.<sup>6</sup>
- Efficiency Measure of 73.5 % (the percent of systemic cases received in TAS).<sup>7</sup>

<sup>5</sup> John M. Dalrymple, Deputy Commissioner For Services and Enforcement, *Memorandum for Senior Executives, Guidance: Integrating Employee Engagement into Daily Operations*.

<sup>6</sup> National Taxpayer Advocate 2005 Objectives Report to Congress V-4. During FY 2007, TAS is planning to change the methodology for computing customer satisfaction scores from 'mean scores' to a 'frequency distribution,' which will result in a restatement of global and local office goals. Frequency distributions are expressed in terms of "x% of satisfied customers." While a crossover strategy is being developed, the current goals, expressed as a mean score, will be retained.

<sup>7</sup> The efficiency measure relates to the value added by the intervention of the Taxpayer Advocate Service. The procedural or systemic hardship criteria used to establish the numerator of the measurement is defined as: 1) A taxpayer experiencing a delay of more than 30 days to resolve a tax account problem (IRC 7811(a)(2)(B)), 2) A taxpayer has not received a response by the date promised, and 3) System(s) or procedure(s) either failed to operate as intended or failed to resolve the taxpayer's problem. The denominator is the number of cases received into the Taxpayer Advocate Service during the Fiscal year meeting our criteria. TAS has realized a 1 to 2 percentage greater efficiency during fiscal years 2003 – 2006. TAS expects a continuing rise in the number and percentage of taxpayer cases involving economic burden receipts attributed to IRS' efforts to decrease the tax gap and other initiatives, such as contracting out collection work. Further, the level of debt accumulated by the average American household has significantly increased over the past several years, and personal consumption has increased at a faster rate than disposable income. Most significantly, the ratio of personal assets to liabilities has declined by double digits, suggesting that payment of debts for many households will be problematic. The expected result is a greater difficulty for taxpayers to meet IRS demands for payment of tax debts. These factors will result in TAS continuing to achieve systemic efficiencies as taxpayers' economic burden increases.

- Employee Satisfaction Goal of 67% as measured by the Employee Engagement Survey question 17.

Together we can lead the way in protecting taxpayer rights and resolving problems resulting in increased voluntary compliance and public confidence in our tax system.

Attachment

# Taxpayer Advocate Service

## *Strategic Objectives And FY 2007 Operational Priorities*

# *Table of Contents*

<b>INTRODUCTION</b>	<b>6</b>
<b>STRATEGY I: Advocate changes in the tax law or procedures that protect taxpayer rights, reduce taxpayer burden, and improve IRS effectiveness</b>	<b>8</b>
I-A: Annual Report to Congress	8
I-B: Systemic Advocacy	8
I-C: Taxpayer Advocacy Panel	11
I-D: Confidentiality	11
I-E: Disaster Relief/Business Resumption Plan	12
I-F: Internal Management Document (IMD)/ Single Point Of Contact (SPOC) Reviews	13
<b>STRATEGY II: Improve TAS' s Ability To Identify And Respond To Taxpayer Concerns</b>	<b>14</b>
II-A: Operations Assistance Request (OAR)	14
II-B: Systemic Advocacy Management System (SAMS)	15
II-C: Delegated Authorities	15
II-D: Bilingual/Multilingual Initiatives	16
II-E: Case Complexity	17
II-F: Communication And Liaison (C&L)	18
II-G: Marketing Campaign And External Outreach	19
II-H: Congressional Outreach	20
II-I: Financial Literacy Toolkit	20
II-J: TAS Toll-Free Telephone Numbers	21
II-K: Technical Advisor Program	21
II-L: TAMIS	22
II-M: Casework Quality	22
II-N: Managerial Involvement with Cases	23
<b>STRATEGY III: Identify Significant Sources Of TAS Casework And Work With Operating Divisions On Strategies To Reduce Inappropriate TAS Workload</b>	<b>24</b>
III-A: Research Initiatives	24
III-B: Collaborative Efforts Between TAS And IRS	25
III-C: Low Income Taxpayer Clinics (LITCs)	26
<b>STRATEGY IV: Ensure The Human Resources Component Of TAS Is Adequate To Meet Its Workload Demands</b>	<b>27</b>
IV-A: Training Initiatives	27
IV-B: Occupational Analysis Study	28
IV-C: Equal Employment Opportunity and Diversity	28
IV-D: Recruitment and Hiring	29

# Introduction

TAS has a responsibility to protect taxpayer rights and reduce taxpayer burden consistent with initiatives critical to the IRS' fulfilling its mission to the U.S. taxpayers and within budgetary limitations.

## **IRS MISSION STATEMENT**

*Provide America's taxpayers top quality service by helping them understand and meet their responsibilities and by applying the tax law with integrity and fairness to all.*

The IRS Strategic Plan for FY 2005 – 2009 outlines three strategic goals that guide the future direction of the agency:

- I. Improve Taxpayer Service
- II. Enhance Enforcement of the Tax Law
- III. Modernize the IRS through its People, Processes and Technology

## **TAS MISSION STATEMENT**

*As an independent organization within the IRS, we help taxpayers resolve problems with the IRS and recommend changes that will prevent the problems.*

The following objectives provide a strategy for meeting our mission as well as assisting the IRS meet its strategic goals which guide the future direction of the agency:

- I. Advocate changes in tax law or procedures that protect taxpayer rights, reduce taxpayer burden, and improve IRS effectiveness.
- II. Improve TAS's ability to identify and respond to taxpayer concerns.
- III. Identify significant sources of TAS casework and work with operating divisions on strategies to reduce inappropriate TAS workload.
- IV. Ensure the human resources component of TAS is adequate to meet its workload demands.

## ***Business Results***

### Taxpayer Advocate Service Business Results - September cum FY 2006

	Full Year Performance				Comparison		% Chg	FY 2006 Plan	% Actual vs. Plan	FY 2007 Goals
	FY 2002	FY 2003	FY 2004	FY 2005	Sep cum FY 2005	Sep cum FY 2006				
Advocacy Issue Receipts	63	871	956	635	574	1,148	100.0%			
Immediate Interventions	5	23	24	19	17	54	217.6%			
Receipts	225,474	196,033	168,856	197,679	197,679	242,173	22.5%			
Systemic Burden Receipts	Not available	152,835	129,382	149,464	149,464	169,198	13.2%			
Systemic Burden Receipt %	Not available	78.0%	76.6%	75.6%	75.6%	69.9%	-7.6%	74.8%	-6.6%	73.5%
Closures	244,236	205,053	170,672	190,153	190,153	234,630	23.4%			
Casework Quality Index	78.5%	84.7%	90.5%	91.6%	91.6%	89.7%	-2.1%	91.5%	-2.0%	91.0%
Precision Margin	0.9%	0.7%	0.5%	0.7%	0.7%	0.7%				
Cycle Time	79.5	75.3	71.1	66.1	66.1	66.7	1.0%			
Employee Satisfaction	56.0%	60.0%	65.0%	70.0%	70.0%	64.0%		73.0%	-12.3%	67.0%
Customer Satisfaction	4.33	4.30	4.30	4.39	4.39	4.34		4.40		4.44
Ending Inventory*	47,418	33,700	32,046	40,648	40,648	48,198	18.6%			

\* Criteria 9 data is not included in the statistics above for ending inventory for FY 2002, 2003 and 2004.

**STRATEGY I: ADVOCATE CHANGES IN THE TAX LAW OR PROCEDURES THAT PROTECT TAXPAYER RIGHTS, REDUCE TAXPAYER BURDEN, AND IMPROVE IRS EFFECTIVENESS**

**I-A: ANNUAL REPORT TO CONGRESS**

1. **Objective:** Monitor the implementation of the TIPRA down payment rules.
2. **Responsible Office(s):** Executive Director of Systemic Advocacy (EDSA), Director Research

**Action(s):**

- Monitor the implementation of the new Tax Increase Prevention and Reconciliation Act of 2005 (TIPRA) down payment rules, conduct an analysis, and propose revision of these rules in the 2007 Annual Report to Congress on December 31, 2007.<sup>8</sup>

**Measurement:**

- Based upon an analysis, propose revisions to the law relating to the down payment rules as a Most Serious Problem in the 2007 Annual Report to Congress.

**I-B: SYSTEMIC ADVOCACY**

1. **Objective:** Identify systemic issues within the IRS that create or increase taxpayer burden and make process improvement recommendations.
2. **Responsible Office(s):** All TAS Employees

**Action(s):**

- In conjunction with the IRS, the EDSA will develop an effective Federal Payment Levy Program (FPLP) screen or exemption amount to protect vulnerable taxpayers from levy. Recommendations regarding research access and planning will be made to the NTA by March 2007.<sup>9</sup>
- The EDSA will ensure that action plans to resolve immediate intervention issues are identified within three (3) to five (5) calendar days of notification of the event.<sup>10</sup>
- The EDSA will research and complete an analysis of how effective the collection payment alternatives are in helping taxpayers resolve their tax debts by March 2007. This analysis will consider the effective use of offer in compromise and installment agreements.<sup>11</sup>
- In conjunction with W&I, the EDSA and Executive Director Case Advocacy (EDCA) will complete the study of a statistically representative sample of 600 injured spouse claims to determine what aspects of the IRS'

<sup>8</sup> National Taxpayer Advocate 2007 Objectives Report to Congress vii.

<sup>9</sup> *Id.* at vi - vii.

<sup>10</sup> *Id.* at 28.

<sup>11</sup> *Id.* at 19 - 22.



**I-B: SYSTEMIC ADVOCACY**

- claim processing system are causing lengthy delays in processing some claims, and issue recommendations to improve the process by June 2007.<sup>12</sup>
- The EDCA will work in partnership with W&I and SB/SE to resolve inconsistent levy release, audit reconsideration, and EITC reconsideration procedures within the campus processing functions through updates to the IRM and SLAs by June 2007.<sup>13</sup>
  - Emphasize the need for all public contact employees to receive substantive, ongoing education about safeguarding taxpayer rights and referring taxpayers to TAS when warranted. The EDSA, Directors of Communications and Liaison (C&L) and Employee Development; and Portfolio Advisor for Taxpayer Rights Training will:
    - Develop a comprehensive education and communication strategy directed at IRS public contact employees that emphasizes protection of taxpayer rights, and timely and appropriate referrals to TAS;
    - Develop a separate, stand-alone training module to address the role and authority of TAS, protection of taxpayer rights, and enhancement of critical thinking skills and judgment. The IRS can insert the module into courses that will not be updated in the immediate future. This approach will ensure that employees receive the necessary taxpayer rights training, even when the operating divisions do not have the time or resources to overhaul their courses; and
    - Utilize all internal communication resources (website, e-learning, e-mail, etc.) to deliver key messages regarding taxpayer rights and the role and authority of TAS to all IRS employees no later than June 30, 2007.<sup>14</sup>
  - The EDSA will establish performance measures to review all advocacy projects prior to closure employing baselines that establish targets and process improvements.
  - Additionally, the EDSA will explore ways to effectively collaborate with the operating divisions to resolve issues that do not reach the level of a Most Serious Problem (MSP).<sup>15</sup>
  - The EDSA will collaborate with the Director, Business Assessment (BA) to develop an internal customer satisfaction survey and use the findings to design improvements to the services and programs provided to internal customers by June 2007.<sup>16</sup>
  - The EDSA will implement a strategy by June 2007 to assist internal customers in the recognition of systemic issues or issues impacting numerous taxpayers negatively that should be elevated via SAMS.
  - BSP will coordinate with the EDSA to develop a work request for Modernization, Information & Technology Services (MITS), to implement the critical program needs and system enhancements necessary to improve SAMS usability and to ensure the system is compliant with section 508 of the Rehabilitation Act of 1973, as amended, 29 U.S.C. section 794(d) by January 2007.<sup>17</sup>
  - The EDSA and EDCA will expand efforts to integrate advocacy by:
    - Utilizing standard criteria in the operational review process to identify strengths and opportunities for improvement;
    - Presenting workshops at the TAS Symposium to all employees to communicate objectives of integration and personal responsibility to elevate systemic issues negatively impacting taxpayers; and
    - Presenting a workshop to Portfolio Advisors on "best practices" in carrying out their role, including identifying issues proactively.<sup>18</sup>
  - The EDSA and EDCA will complete a comprehensive workload study and utilize the findings to adjust or prioritize organizational resources for Field Systemic Advocacy by March 2007.

<sup>12</sup> *Id.* at 23 - 24.

<sup>13</sup> National Taxpayer Advocate 2007 Objectives Report to Congress at 24 - 25.

<sup>14</sup> *Id.* at 25 - 26.

<sup>15</sup> *Id.* at V-1.

<sup>16</sup> *Id.* at V-1.

<sup>17</sup> *Id.* at V-2.

<sup>18</sup> *Id.* at V-2.

**I-B: SYSTEMIC ADVOCACY**

- The EDCA will utilize the skills self-assessment administered to Field Systemic Advocacy analysts in FY 2006 to identify skill gaps and provide opportunities to address these gaps by January 2007.
- To enhance opportunities for skill sharing and employee engagement, EDCA and EDSA will develop peer training and skill sharing initiatives by June 2007.<sup>19</sup>
- The EDSA will explore incorporating problem solving and systems management approaches demonstrated in Malcolm Baldrige criteria to positively impact effective resolutions to systemic issues.<sup>20</sup>
- In conjunction with the Wage and Investment (W&I) Operating Division, TAS will develop and pilot a new efficiency measure.
  - TAS will identify its top three issues based on TAMIS data and other TAS sources;
  - The Operating Divisions (ODs) will concurrently do samples of the workloads responsible for generating the TAS cases;
  - TAS will conduct a pilot on one of these issues during FY 2007 to ensure appropriate processes are in place; and
  - TAS will continue to track all unresolved issues for consideration in the NTA's Annual Report to Congress.
- The EDSA and EDCA will issue guidance to clarify the portfolio process and Business Unit communications by March 2007.
- The Area Directors will champion the enhancement of the portfolio process to improve knowledge,

**Measurement:**

- Report the Internal Systemic Advocacy Satisfaction score and utilize the baseline to establish goals for FY 2008 and beyond;
- Establish performance measures to review all advocacy projects prior to closure employing baselines that establish targets and process improvements. Utilize this data to set goals for FY 2008 and beyond;
- In accordance with IRC § 7803, track recommendations made to Operating Divisions which were implemented and develop a measure of their impact on taxpayer burden and taxpayer rights. For example, an Efficiency Measure on a particular systemic issue (i.e., Audit Recons) captured at the beginning of the year (October 1, 2006) compared with the Efficiency Measure of the issue at the end of the year (September 30, 2007); and
- Pursue the Oversight Board Measure on key cases and systemic issues.

<sup>19</sup> National Taxpayer Advocate 2007 Objectives Report to Congress at V-2.

<sup>20</sup> *Id.* at V-2.

I-C: TAXPAYER ADVOCACY PANEL
<ol style="list-style-type: none"> <li>1. <b>Objective:</b> Improve processes and procedures within the IRS by identifying the sources of "grassroots" issues.</li> <li>2. <b>Responsible Office(s):</b> Director, Taxpayer Advocacy Panel (TAP)</li> </ol>
<p><b>Action(s):</b></p> <ul style="list-style-type: none"> <li>• Compare the FY 2005 and 2006 exiting TAP member surveys to identify improvement opportunities in recruitment, training and issue development;</li> <li>• Accomplish the one-third retention goal by recruiting to fill 28 vacancies during the 2006 campaign;<sup>21</sup></li> <li>• Develop a new national communications strategy to elevate TAP's profile both externally and internally, by increasing visibility and awareness among all TAP audiences and stakeholders;<sup>22</sup></li> <li>• Conduct four Town Hall Meetings in FY 2007; and</li> <li>• Establish a measures committee for TAP, utilizing various monitoring tools for satisfaction, and baseline measures.</li> </ul>
<p><b>Measurement:</b></p> <ul style="list-style-type: none"> <li>• Utilize this data to establish goals for FY 2008 and beyond.</li> </ul>

I-D: CONFIDENTIALITY
<ol style="list-style-type: none"> <li>1. <b>Objective:</b> Utilize TAS's statutory discretion to keep taxpayer contact and taxpayer-provided information confidential to encourage taxpayers to seek TAS assistance.</li> <li>2. <b>Responsible Office(s):</b> Director, Technical Analysis and Guidance (TAG)</li> </ol>
<p><b>Action(s):</b></p> <ul style="list-style-type: none"> <li>• Review and publish the confidentiality chapter for the Internal Revenue Manual Part 13 by December 1, 2006; and</li> <li>• Revise the confidentiality questionnaires by January 2007 to ensure all factors are considered in making confidentiality recommendations to the NTA.<sup>23</sup></li> </ul>
<p><b>Measurement:</b></p> <ul style="list-style-type: none"> <li>• Publish the IRM and confidentiality questionnaire by January 2007 and confirm all appropriate factors are included by vetting the document with key stakeholders.</li> </ul>

<sup>21</sup> National Taxpayer Advocate 2007 Objectives Report to Congress 56.

<sup>22</sup> *Id.* at 58 - 59.

<sup>23</sup> *Id.* at V-2.

**I-E: DISASTER RELIEF/BUSINESS RESUMPTION PLAN**

1. **Objective:** To position TAS to respond to disasters with minimum disruption to work processes (i.e., Business Resumption) and ensure continued service to taxpayers by providing appropriate guidance.
2. **Responsible Office(s):** Directors, Vision & Strategy (V&S), Employee Development, Business Systems Planning, and TAS Management

**Action(s):****Business Resumption**

- Perform annual testing of contingency plans and disaster recovery plans for all major (high risk impact) information systems;<sup>24</sup>
- The Director, Employee Development will provide support necessary to train our employees on disaster and business resumption issues and update the training modules specifically to address each individual disaster as it occurs;
- Utilize TAMIS to monitor TAS disaster-related cases;
- Provide comprehensive guidance to the field on how Headquarters will assist and aid in the local disaster response;
- Develop comprehensive strategies around resuming TAS's critical processes;
- Every director will ensure employee contact information is updated and call-test lists are in place;
- Review TAS chapters and IRS Disaster IRM by January 2007 and update accordingly to include lessons learned;
- Strengthen the national unity of command and incident reporting process;
- Collaborate with the IRS Mission Assurance Organization to test the effectiveness of the TAS Business Resumption Plan in concert with the other operating divisions;
- Ensure each TAS office has a viable Business Resumption Plan (BRP);
- Maintain copies of all local BRPs electronically at headquarters; and
- Systematically capture lessons learned.<sup>25</sup>

**Disaster Relief**

- Maintain our working partnership with the American Bar Association to provide a rapid response in the event of a new disaster;
- The Director, Employee Development will provide support necessary to train our employees on disaster issues and update the training modules specifically to address each individual disaster as it occurs;
- Utilize TAMIS to monitor TAS disaster-related cases;
- Advocate for the establishment of an IRS standing committee on disaster relief;
- Create practice projects based on "lessons learned", which can be rapidly placed into action in the event of a disaster;<sup>26</sup>
- Provide comprehensive guidance to the field on how Headquarters will assist and aid in the local disaster response; and
- Systematically capture lessons learned.<sup>27</sup>

<sup>24</sup> IRS, *Computer Security Plan 2A-01-01* 16.

<sup>25</sup> National Taxpayer Advocate 2007 Objectives Report to Congress 15 - 16.

<sup>26</sup> *Id.*

<sup>27</sup> *Id.*

**I-E: DISASTER RELIEF/BUSINESS RESUMPTION PLAN****Measurement:**

- Collect and house viable electronic BPR office plans from all TAS offices;
- Incorporate lessons learned into the training, IRM, and Business Resumption Plans;
- Review and update the TAS IRM chapter by January 2007 regarding disaster relief; and
- Conduct a test call of call tree lists periodically for business resumption purposes.

**I-F: INTERNAL MANAGEMENT DOCUMENT (IMD)/ SINGLE POINT OF CONTACT (SPOC) REVIEWS**

1. **Objective:** To have consolidated guidelines that are easily accessible, and provide consistent policies and procedures throughout TAS.
2. **Responsible Office(s):** Executive Director, Systemic Advocacy, specifically the IMD/SPOC Coordinator.

**Action(s):**

- Automate IMD distribution process;
- Reduce burden on TAS respondents; and
- Timely forward appropriate responses to the NTA for review.

**Measurement:**

- Incorporate TAS IMD/SPOC guidance in IRM in FY 2007.

**STRATEGY II: IMPROVE TAS' S ABILITY TO IDENTIFY AND RESPOND TO TAXPAYER CONCERNS**
**II-A: OPERATIONS ASSISTANCE REQUEST (OAR)**

1. **Objective:** Improve the OAR process to improve the overall quality of case resolution.
2. **Responsible Office(s):** Directors, TAG and BSP

**Action(s):**

- Work with operating divisions and functions to improve routing of OARs;
- Evaluate how effective the W&I interactive addenda are, and collaborate with the other operating divisions;<sup>28</sup>
- Revise the Form 12412, Operations Assistance Request, to improve the clarity and functionality of the form, thereby reducing rejections;
- Based on the revisions, issue a work request to Modernization, Information & Technology Services (MITS) by December 31, 2006 to make modifications concerning the electronic routing of Form 12412, Operations Assistance Request, such as add additional reasons codes, clarifying current reason codes, and addressing withdrawals of OARs before issuance to the operating division;<sup>29</sup>
- Identify training needs for TAS and operating division employees for specific issues, such as documentation for levy releases; and
- Clarify the OAR processing and coding provisions in IRM 13 and in conjunction with the Director, Employee Development, train TAS employees, especially in OAR rejects by September 2007.<sup>30</sup>

**Measurement:**

- Reduce rejected OARs by 10 percent nationally through systemic improvement;
- Implement an OAR extension report for Area and LTA use by December 2006; and
- Build OAR report for management intervention on "extension" requests by December 31, 2006.

<sup>28</sup> National Taxpayer Advocate 2007 Objectives Report to Congress 45.

<sup>29</sup> *Id.* at V - 13.

<sup>30</sup> *Id.* at 46.

II-B: SYSTEMIC ADVOCACY MANAGEMENT SYSTEM (SAMS)
<ol style="list-style-type: none"> <li>1. <b>Objective:</b> Provide TAS with a means of creating, working, and monitoring systemic advocacy projects.</li> <li>2. <b>Responsible Office(s):</b> EDSA and Director, BSP</li> </ol>
<b>Action(s):</b> <ul style="list-style-type: none"> <li>• The Director, BSP will enhance the SAMS system to correlate TAMIS and SAMS issue codes;<sup>31</sup></li> <li>• Conduct analysis and comparison of TAMIS and SAMS issue codes (TAG/EDSA); and</li> <li>• Report new potential projects as a result of the correlation of TAMIS and SAMS issue codes.</li> </ul>
<b>Measurement:</b> <ul style="list-style-type: none"> <li>• SAMS and TAMIS systems are properly linked; and</li> <li>• Number of new projects identified through linkage and analysis.</li> </ul>

II-C: DELEGATED AUTHORITIES
<ol style="list-style-type: none"> <li>1. <b>Objective:</b> Ensure TAS employees appropriately apply the necessary delegated authorities.</li> <li>2. <b>Responsible Office(s):</b> Directors, Executive Steering Committee TAS representative(s)</li> </ol>
<b>Action(s):</b> <ul style="list-style-type: none"> <li>• Modify the current TAS delegated authorities based upon the revised delegation order from the Commissioner in response to recommendations from the Delegated Authorities Executive Steering Committee;</li> <li>• Develop an implementation strategy to include a communication and training package for TAS and IRS employees by March 2007;<sup>32</sup> and</li> <li>• Brief the Executive Committee in October 2006.</li> </ul>

<sup>31</sup> National Taxpayer Advocate 2007 Objectives Report to Congress 32.

<sup>32</sup> *Id.* at V – 3.

II-D: BILINGUAL/MULTILINGUAL INITIATIVES
<ol style="list-style-type: none"> <li>1. <b>Objective:</b> Increase TAS awareness among underserved and English as a Second Language (ESL) taxpayers.</li> <li>2. <b>Responsible Office(s):</b> Directors, Communications &amp; Liaison and BSP, and EDCA</li> </ol>
<p><b>Action(s):</b></p> <ul style="list-style-type: none"> <li>• Expand outreach to multilingual communities by providing TAS information in an additional four languages -- Chinese, Korean, Russian and Vietnamese – as well as English and Spanish;</li> <li>• Develop and publicize a five-language poster featuring the 1-877-Ask TAS1 number for Spanish, Chinese, Korean, Russian, and Vietnamese-speaking taxpayers. The poster will be sent to community organizations, religious institutions, and local marketplaces serving these populations by June 2007;<sup>33</sup></li> <li>• Provide taxpayers speaking Chinese, Korean, Russian, and Vietnamese with the ability to request TAS telephonically through a voice response messaging system on 1-877-Ask TAS1; and</li> <li>• Form a team to determine the best method to provide additional assistance to bilingual taxpayers, to be completed by September 2007.</li> </ul>
<p><b>Measurement:</b></p> <ul style="list-style-type: none"> <li>• Conduct grassroots outreach activities to the Chinese, Korean, Russian, and Vietnamese communities in targeted areas; and</li> <li>• Deployment of the voice response messaging system on 1-877-Ask TAS1.</li> </ul>

<sup>33</sup>National Taxpayer Advocate 2007 Objectives Report to Congress V-8.



II-E: CASE COMPLEXITY
<ol style="list-style-type: none"> <li>1. <b>Objective:</b> Implement the approved case complexity recommendations.</li> <li>2. <b>Responsible Office(s):</b> Case Complexity Team Leader, Director BSP</li> </ol>
<p><b>Action(s):</b></p> <ul style="list-style-type: none"> <li>• Submit a work request to create a complexity screen on TAMIS that will capture the proposed 22 complexity factors;<sup>34</sup></li> <li>• Generate a complexity score to ultimately be incorporated into an automated inventory balancing system;</li> <li>• Allow for multiple issue codes and explore the possibility of unlimited issue codes; and</li> <li>• Change complexity codes to advanced assignment codes.</li> </ul>
<p><b>Measurement:</b></p> <ul style="list-style-type: none"> <li>• Submission of approved work request to MITS by December 31, 2006.</li> </ul>

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<sup>34</sup> National Taxpayer Advocate 2007 Objectives Report to Congress V-10.

## II-F: COMMUNICATION AND LIAISON (C&L)

1. **Objective:** Improve internal communications, education and TAS messages.
2. **Responsible Office(s):** EDSA, EDCA, All TAS Directors, Content Managers, and LTAs

### Action(s):

- To ensure taxpayers understand the function of TAS, when it is appropriate to request TAS assistance, and how to make the request, the TAS Standard Language Team has been chartered to:
  - Create TAS standard language for IRS letters and notices;
  - Complete a comprehensive review of references to TAS in all IRS letters and notices;
  - Review existing language on IRS.gov and IRWeb;
  - Crosswalk the standard TAS phrases to the current letters and notices;
  - Work with the letter/notice owners to update the language with clear, concise, and consistent information;
  - Update the IRM to reflect the updated language; and
  - Develop a mechanism that ensures all future new and updated letters and notices are funneled through the TAS Single Point of Contact (SPOC) for review.
- Reinforce TAS's internal website as an internal information portal for all IRS employees;
- Develop internal educational products for IRS employees;
- Provide training on creating 508 compliant documents and ensure all identified products not 508 compliant are updated by December 2006, followed by an additional review of 508 Compliance on TAS's website to ensure the site is 508 compliant by June 30, 2007;
- Ensure Special Counsel to the NTA is provided the opportunity to review all internal educational and communication materials; and
- Ensure established TAS communications assistance request procedures are followed.

### Measurement:

- Development of a strategic plan to incorporate TAS standard language into all IRS letters and notices, forms, publications, and the IRS.gov web site with product validation or projected update information by April 30, 2007;
- Posting of internal educational products for IRS employees on the Advocate Toolkit;
- 508 compliance of TAS's intranet and internet pages;
- Counsel review of products; and
- Webbies and internal messages reinforcing TAS's website and communication process.

## II-G: MARKETING CAMPAIGN AND EXTERNAL OUTREACH

1. **Objective:** Continue outreach to identified underserved markets to ensure that taxpayers are aware of our organization and its services.
2. **Responsible Office(s):** Directors, C&L and BSP; EDCA, Area Directors, and Local Taxpayer Advocates (LTA)

### Action(s):

- Complete the four-year marketing contract with Foote, Cone and Belding by September 2007. Three new deliverables have been added to the work in progress:
  - (1) the creation of a phrase or slogan to facilitate name-recognition of the Taxpayer Advocate Service;
  - (2) a follow-up marketing study of taxpayers underserved by TAS; and
  - (3) the publication of a financial literacy toolkit.
- LTAs in the 26 test market cities will continue their efforts to reach underserved populations. Supplemented by public service announcements in radio, newspapers, magazines and outdoor signs, LTAs in these communities will maximize opportunities to increase TAS awareness in groups who may need TAS services but do not know that help is available at no charge.<sup>35</sup>
- Commission a marketing study to determine the change in taxpayers' awareness of the Taxpayer Advocate Service to be completed by September 2007. The study will use techniques similar to those employed in a 2002 analysis, which found that many taxpayers who may need TAS services are unaware these free services are available.<sup>36</sup>
- Collaborate with W&I to communicate identification requirements for federal buildings to the general public, to external partners who send taxpayers to IRS offices, and internally to IRS employees. TAS will include additional guidance in a financial literacy project already underway.<sup>37</sup>
- The Director, BSP will migrate the customer outreach database from a desktop Access database program to a web based client-server application by December 2006. The TAS Customer Outreach System (COS) will provide the following features:
  - 24/7 access via the IRS intranet;
  - HQ/area/local office outreach event and resource planning for each fiscal year;
  - Area office approval of local plans;
  - An audit trail of plan modifications;
  - Restricted access for plan creation and updates; and
  - Fixed and ad hoc reports for single or multiple years.
- The Directors, C&L and Employee Development will conduct a COS train-the-trainer session for HQ and Area outreach analysts in October 2006, with system rollout and local office personnel training completed by December 2006.

### Measurement:

- Completion/receipt of the three contract deliverables;
- Monitor the Outreach Codes entered onto the TAMIS and outreach databases to determine the effectiveness of the current outreach strategy; and
- Rollout of the TAS Customer Outreach System (COS)

<sup>35</sup> National Taxpayer Advocate 2007 Objectives Report to Congress 62 - 63.

<sup>36</sup> *Id.* at 63.

<sup>37</sup> *Id.* at 65.

## II-H: CONGRESSIONAL OUTREACH

1. **Objective:** Provide targeted service to Congress.
2. **Responsible Office(s):** EDCA, Director C&L, Area Directors (ADs), LTAs, and TAGMs

### Action(s):

- On April 18, 2006, the Gallup Organization began an electronic survey of more than 800 congressional office staff members who work with local offices on constituent cases. We will use the results to drive improvements in service to members of Congress and to develop FY 2007 congressional outreach strategies by October 2006.<sup>38</sup>
- Discuss the results of the survey at the Congressional Affairs Conference in early 2007.

### Measurement:

- Confirmation of receipt of survey results with decision made at survey results level to enhance or continue customer service provided to Congressional offices.
- Discussion of survey results with Area Directors and LTAs.

## II-I: FINANCIAL LITERACY TOOLKIT

1. **Objective:** Provide financial literacy education and outreach information.
2. **Responsible Office(s):** Director, C&L and Director, LITC

### Action(s):

- Produce a comprehensive financial literacy toolkit (in both paper and electronic formats) that will provide in-depth information on a number of topics including ITINs, RALs, EITC, Low Income Taxpayer Clinics (LITCs), the process for securing banking services, available IRS resources, and TAS messages. The toolkit will be a companion collateral package to complement and augment a Spanish-language LEP (limited English proficiency) DVD.<sup>39</sup> The toolkit will be completed by September 2007.

### Measurement:

- Complete the financial literacy toolkit by September 2007.

<sup>38</sup> National Taxpayer Advocate 2007 Objectives Report to Congress 60.

<sup>39</sup> *Id.* at V-9.

## II-J: TAS TOLL-FREE TELEPHONE NUMBERS

1. **Objective:** Re-brand the NTA Toll-free line to the TAS Case Intake Line.
2. **Responsible Office(s):** EDCA, Directors, V&S, C&L and BSP TAG

### Action(s):

- The Directors C&L, BSP, and TAG will change the NTA Toll-free Hotline Script to ensure explanations of TAS case acceptance criteria are clearly defined;
- The Directors, C&L and BSP, will incorporate parts of the new script on the 1-877-Ask TAS1 toll free number to see if improvement of initial script clarifies purpose of TAS;
- The EDCA will establish a team between TAS and W&I to address training deficiencies and outreach efforts of the toll-free assistors;
- The Directors C&L, BSP, TAG and V&S will continue to monitor calls on the NTA Toll-free Hotline to identify trends, and improvement opportunities; and
- The EDCA and Director BSP will consider the immediate transfer of calls that meet criteria to TAS intake sites based on the taxpayer's locations to be completed by September 2007.<sup>40</sup>

### Measurement:

- Increase (change in) percentage of calls that come into NTA toll free that are made TAS cases.
- This percentage is currently 23%.

## II-K: TECHNICAL ADVISOR PROGRAM

1. **Objective:** Enhance the Technical Advisor Program.
2. **Responsible Office(s):** EDCA and Director, Internal Technical Advisor Program (ITAP) and Director C&L

### Action(s):

- Expand the TAS intranet site to include a webpage where Technical Advisors (TAs) share information relative to tax law and policy. This will help to ensure consistent taxpayer treatment, and strengthen uniformity and information sharing among TAS.<sup>41</sup>

### Measurement:

- Complete technical advisor program realignment by December 31, 2006.
- Establish tech advisor webpage by February, 2007.

<sup>40</sup> National Taxpayer Advocate 2007 Objectives Report to Congress V-12.

<sup>41</sup> *Id.* at V-14.

II-L: TAMIS
<ol style="list-style-type: none"> <li>1. <b>Objective:</b> Enhance information on case processing time to support resource planning.</li> <li>2. <b>Responsible Office(s):</b> Director, BSP</li> </ol>
<b>Action(s):</b> <ul style="list-style-type: none"> <li>• Implement a time reporting component on TAMIS to capture actual time spent on casework. <ul style="list-style-type: none"> <li>○ The first phase, to be implemented in January 2007, creates a background framework to start and stop time recording on user access and work on TAMIS cases. This process will provide TAS with the capability to determine time worked on cases by various characteristics of the case (e.g., core issue codes, TAS office).</li> <li>○ The second phase of the system will create TAMIS screens to capture time spent on cases when TAMIS is not required for the work, allowing the user to enter and edit his or her own time.<sup>42</sup> The anticipated date to implement phase II is December 2007.</li> </ul> </li> <li>• Issue a work request to MITS to allow for the automatic rerouting of inventory from Puerto Rico through the Desktop Integration System.</li> </ul>
<b>Measurement:</b> <ul style="list-style-type: none"> <li>• Timely implementation of product.</li> </ul>

II-M: CASEWORK QUALITY
<ol style="list-style-type: none"> <li>1. <b>Objective:</b> Enhance the TAS Quality Measurement Process.</li> <li>2. <b>Responsible Office(s):</b> Director, Business Assessment (BA)</li> </ol>
<b>Action(s):</b> <ul style="list-style-type: none"> <li>• Develop changes to the TAS Quality Standards by September 30, 2007;</li> <li>• Study the feasibility of creating an online Quality Review database.<sup>36</sup> The study will be completed by June 2007;</li> <li>• Advocate Advisory Board (AAB) to review and discuss proposed changes to the Quality Standards prior to the CAP Conference;</li> <li>• LTAs to provide input at the CAP conference regarding potential TAS Quality Standards; and</li> <li>• Crosswalk any approved new measures to former quality measures.</li> </ul>
<b>Measurement:</b> <ul style="list-style-type: none"> <li>• Implement new quality standards in October 2007.</li> <li>• Improved inventory management and OAR processes.</li> </ul>

<sup>42</sup> National Taxpayer Advocate 2007 Objectives Report to Congress 51.

## II-N: MANAGERIAL INVOLVEMENT WITH CASES

**1. Objective:** To improve the overall quality of case resolution.

**2. Responsible Office(s):** ECDA, Area Directors, LTAs, Managers, Analysts, Case Advocates

**Action(s):**

- Develop quality action plans to achieve the office quality goal;
- The EDCA and Area Directors will convene at least one Case Review Panel;
- In conjunction with performing annual workload reviews approximately at mid-year for each employee, Local Taxpayer Advocates (LTAs) and/or Taxpayer Advocate Group Managers (TAGMs) will perform the following reviews outlined below. Alternatively, analysts may be directed to perform non-evaluative case reviews:
  - Review two (2) closed cases per quarter for each employee; (evaluative)
  - Review every case over 100 days old and every 60 days thereafter and provide guidance to the case advocate to bring the case to closure; (non-evaluative or evaluative); and
  - Perform an early intervention review within 10 – 21 days of the Taxpayer Advocate Received Date (TARD) for at least 10 percent of the case receipts each week during September through January, and for at least 5 percent during February through August. (evaluative or non-evaluative)

**Measurement:**

- Achievement of quality goal.
- Timely completion of reviews and feedback.

**STRATEGY III: IDENTIFY SIGNIFICANT SOURCES OF TAS CASEWORK AND WORK WITH OPERATING DIVISIONS ON STRATEGIES TO REDUCE INAPPROPRIATE TAS WORKLOAD**

**III-A: RESEARCH INITIATIVES**

1. **Objective:** Use research and data to further advance TAS understanding of taxpayer issues and make recommendations to the IRS and/or Congress to address the issues.
2. **Responsible Office(s):** EDSA and Director, Research

**Action(s):**

- TAS Research will define its continuing role in the Taxpayer Assistance Blueprint Process at the completion of Phase II. (Phase II is scheduled for completion in late 2006.)<sup>43</sup>
- Explore ways to validate model results from the "Tipping Point" study against actual outcomes for one or more Abusive Tax Schemes. Our goal is to complete a trial validation by the end of March 2007.<sup>44</sup> Develop a simulation to replicate results of the 2004 EITC certification test conducted in Hartford and explore alternative outreach strategies. Target date for completion is August 2007.
- Conduct a study to determine how operating/functional division activities generate workload for TAS. The target completion date for the study is December 2006.<sup>45</sup>
- The Impact of Representation on the Outcome of EITC Audits - The target completion date for the audit outcome portion of the study is December 2006, but some results for cases in Appeals or litigation may not be available for reporting.<sup>46</sup>
- Identifying EITC Taxpayer Customer Service Needs: Utilize the survey results derived from a representative sample of all EITC claimants to recommend potential improvements in EITC customer service. The target date for study completion is November 2006.<sup>47</sup>
- Identifying EITC Correspondence Audit Barriers - Utilize the survey results derived from a representative sample of taxpayers who recently experienced an EITC correspondence audit to recommend potential improvements to the EITC correspondence audit process. Study results should be available by March 2007.<sup>48</sup>

**Measurement:**

- Complete studies.

<sup>43</sup> National Taxpayer Advocate 2007 Objectives Report to Congress 8 - 10.

<sup>44</sup> *Id.* at 10 - 11.

<sup>45</sup> *Id.* at 12.

<sup>46</sup> *Id.* at 12 - 13.

<sup>47</sup> *Id.* at 13 - 14.

<sup>48</sup> *Id.* at 14.



### III-B: COLLABORATIVE EFFORTS BETWEEN TAS AND IRS

1. **Objective:** Partner with the IRS to improve processes to allow taxpayers to better comply with tax laws.
2. **Responsible Office(s):** Various AAB members and LTAs

#### Action(s):

- Participate in the following Task Force/Teams:
  - Agency-Wide FTD Penalty Task Force;
  - Appeals/SBSE Fast Track Settlement Initiative Team;
  - CI Liaison;
  - Cash Economy;
  - Collection Statute Expiration Date (CSED);
  - Debt Indicator Tool on Refund Anticipation Loans;
  - Employment Tax Advisory Group;
  - IRS W&I, Form 886-H Series, Information Request Redesign Group;
  - Form 94X Design;
  - Form 940 Redesign Team;
  - Form 944, Employer's Annual Federal Tax Return;
  - Form 1040 & Schedule O;
  - IRS Joint W&I and TAS Injured Spouse Claim;
  - Mail Out Strategy;
  - Notice Communication & Advisory Group (NCAG);
  - OPM Levy Authorization;
  - Private Debt Collections (PDC) Initiative;
  - Simplification of the Extension to File Process;
  - Taxpayer Assistance Blueprint (TAB);
  - Uniform Definition of a Qualifying Child (UDOC);
  - Communication Strategy for On-line Installment Agreements;
  - Communication Strategy on Direct Deposit of Split Refunds;
  - Electronic Outreach to Practitioners; and
  - National EITC Awareness Day.

#### Measurement:

- Report key actions quarterly via the Business Performance Review and update SAMS monthly.

### III-C: LOW INCOME TAXPAYER CLINICS (LITCs)

1. **Objective:** Help organizations provide free or low-cost legal assistance to low income taxpayers in resolving tax disputes, and inform taxpayers for whom English is a second language about their tax rights and responsibilities.
2. **Responsible Office(s):** Director, LITC Program

#### Action(s):

- Continue its commitment to achieving maximum access to representation for low income taxpayers by working towards the following goals in awarding 2007 LITC grants:
  - Maintaining at least one clinic in every state, the District of Columbia and Puerto Rico, and to expand clinic coverage to Guam and rural areas.<sup>49</sup>
  - Expanding coverage in states that do not have both controversy representation and ESL education and outreach; and
  - Evaluating that grant recipients demonstrate they serve geographic areas with sizable populations that need LITC services.<sup>50</sup>
- Goals for New Site Assistance Visits:
  - Every clinic funded in 2007 will receive an on-site assistance visit;
  - Every clinic funded in 2007 will be visited by the LTA in the state where the clinic is based; and
  - The LITC Program Office will complete in-depth on-site assistance visits to at least 25 percent of the clinics funded in 2007.<sup>51</sup>
- Annual 2007 LITC Conference, which will be held in December 2006.
  - One focus of this year's conference will be improving the understanding of and involvement with technical components of LITC operations including confidentiality and security of taxpayer information, client attorney privilege, and LITC reporting requirements.<sup>52</sup>
- At the FY 2008 LITC Conference, TAS will share with all participants a Program Letter outlining the performance measures by which clinics will be evaluated.<sup>53</sup>
- Establish goals and performance measures by June 2007 for the LITC Program to assist Congress and the IRS in evaluating the success of the program. TAS will communicate the general expectations derived from these measures to prospective clinics during the application process and reinforce the measures to grant recipients at the Annual LITC Conference and during assistance visits.<sup>54</sup>
- The LITC Program Office will work with the LITCs to capture statistical and anecdotal information about LITC casework and outreach activities. The LITC Director will consolidate and report on the findings to the NTA by September 2007.<sup>55</sup>

#### Measurement:

- Establish goals and performance measures by June 2007 for the LITC Program to assist Congress and the IRS in evaluating the success of the program.
- Completion of site assistance visits.
- Increase the percentage of states that have both English as Second Language and Controversy Clinics in

<sup>49</sup> National Taxpayer Advocate 2007 Objectives Report to Congress 52.

<sup>50</sup> *Id.* at 53.

<sup>51</sup> *Id.*

<sup>52</sup> *Id.* at 54.

<sup>53</sup> *Id.*

<sup>54</sup> *Id.* at 54-55.

<sup>55</sup> *Id.* at 55.

### III-C: LOW INCOME TAXPAYER CLINICS (LITCs)

each state.

## STRATEGY IV: ENSURE THE HUMAN RESOURCES COMPONENT OF TAS IS ADEQUATE TO MEET ITS WORKLOAD DEMANDS

### IV-A: TRAINING INITIATIVES

1. **Objective:** Ensure a strong connection between employee training and the organizational business drivers, customer and employee satisfaction as well as business results.
2. **Responsible Office(s):** DNTA and Director, Employee Development (ED)

#### Action(s):

- Deliver the TAS Technical Training Symposium to all technical TAS employees in the fourth quarter of FY 2007;<sup>56</sup>
- Develop and deliver the second phase of the Case Advocate curriculum, focusing on technical tax law concepts associated with complex cases;<sup>57</sup>
- Develop high quality, interactive case study training for the FY 2007 Taxpayer Advocate Service Technical Training Symposium;
- Modify the Four-Year Training Plan to enhance the catalog of training offerings and provide up to date information and reports to assess training needs;
- Develop and deliver Filing Season updates by January 19, 2007;
- In conjunction with Area Director Champions, develop and deliver workshops focused on opportunities identified in Customer Satisfaction Survey, Quality, and Four Year Training Plan; and
- Continue to focus on leadership development through Frontline Leadership Readiness Program and Senior Management Readiness Program, and place a priority on funding the Front Line Manager and Senior Manager Courses.

#### Measurement:

- Timely product completion; and
- Achieve a score of 4 out of 5 on the Level I evaluation process for our training events.

<sup>56</sup> TAS, FY 2006 Program Letter Attachment 10.

<sup>57</sup> National Taxpayer Advocate 2007 Objectives Report to Congress 67.

#### IV-B: OCCUPATIONAL ANALYSIS STUDY

3. **Objective:** Identify the level of employee proficiencies to assist in future case assignment and Position Description (PD) development.
4. **Responsible Office(s):** Director, Employee Development

##### Action(s):

- Utilize the instrument developed by the IRS Human Capital Office to access case advocate competencies by June 2007.<sup>58</sup>

##### Measurement:

- Percentage of employees completing the assessment tool.

#### IV-C: EQUAL EMPLOYMENT OPPORTUNITY AND DIVERSITY

1. **Objective:** Effectively manage and leverage the diversity of the TAS workforce.
2. **Responsible Office(s):** Directors, EEO and Employee Development

##### Action(s):

##### Directors will:

- Include a specific EEO and Diversity performance commitment for FY 2007;
- Ensure that all TAS Directors and Managers take a minimum of one ELMS EEO and Diversity training course during FY 2007;
- Ensure that individuals selected for management positions demonstrate a commitment to diversity; and
- Use Alternate Dispute Resolution (ADR) as a vehicle for resolving EEO complaints.

##### TAS EEO & Diversity will:

- Develop and implement workplace conflict prevention training;
- Implement the exit interview survey by December 31, 2006;
- Enhance and improve the TAS EEO & Diversity web page;
- The EDCA, Directors EEO and Employee Development will implement and monitor a tracking system for developmental opportunities within TAS;
- The EDCA, Directors EEO and Employee Development will utilize the TAS Wednesday Weekly to announce developmental opportunities and develop a system for tracking developmental assignments and expressions of interest;
- The EDCA, Directors EEO and Employee Development will develop a mechanism to identify, announce and secure volunteers for developmental assignments;
- Convene the EEO and Diversity Committee by March 2007;
- Revise the EEO Settlement Authority Guidelines; and
- Continue to evaluate the TAS EEO and Diversity program against Management Directive 715 and develop strategies to address any deficiencies identified.

<sup>58</sup> National Taxpayer Advocate 2007 Objectives Report to Congress 68 - 69.

#### IV-C: EQUAL EMPLOYMENT OPPORTUNITY AND DIVERSITY

##### Measurements:

- Increase the ADR participation rate to 35 percent;
- Improve Employee Satisfaction results;
- Barriers identified and addressed; and
- Completion of specified activities.

#### IV-D: RECRUITMENT AND HIRING

1. **Objective:** Attract and maintain a competitive and diverse workforce.
2. **Responsible Office(s):** Executives, Directors, EEO and Employee Development

##### Action(s):

- Ensure each TAS Area hires a minimum of one employee with a targeted disability;
- Ensure each TAS Area hires a minimum of one student from the FY 2007 Workforce Recruitment Program (WRP);
- When filling vacancies for grades 13 and above, TAS hiring officials will consult with Directors, EEO and Employee Development, to identify effective recruiting strategies;
- Ensure all TAS vacancy announcements include an EEO statement i.e., TAS values diversity and the strengths it brings to the workplace; and
- Employee Development will provide support for all TAS hiring initiatives to ensure the timely selection of employees.

##### Measurement/Deliverables:

- Fully optimize the use of all allocated salary dollars and accomplish all key actions;
- Ensure ranking packages for TAS vacancies are provided to the appropriate TAS officials within the timeframe established in the customer agreements between TAS and the Human Capital Office (HCO);
- Develop a succession plan for TAS leadership;
- Identify internal and external recruitment opportunities for LTAs, Intake, Bilingual, and Case Advocates; and Analysts by December 2006. The report will include:
  - Overage applicant pool;
  - Number of employees with disabilities; and
  - Number of WRP Students with disabilities.
- Composition of applicant pool; and
- Number and percentage of employees with targeted disabilities.